UPLOADING MONTHLY MEDICAL TRANSFERS ONLINE – INSTRUCTIONS

1. Save your inbound and outbound medical marijuana transfers as two separate CSV files. (See section below titled "What is a CSV?" for more information.)
2. Ensure that the titles of your columns, also known as "headers," appear in the top row of your document (in Excel, and most other spreadsheet software, this is labelled as "Row 1").
3. It is good practice to indicate in your file name whether it is inbound or outbound data, as well as the month being reported. For example, "Inbound MMD00001 June 2016.csv".
4. It may be helpful to keep your file open as you continue through the upload process. This will allow you to refer back to your file and make changes if necessary.
5. Log into your dispensary account at https://mmdapply.oregon.gov/Account/Login
6. Click on the "Inventory" tab.
7. Under the "Inventory" label is a button labelled "Upload Inventory."
8. An "Upload Inventory" pop-up window will appear when the "Upload Inventory" button is clicked.
9. After reading the instructions click "Next".
10. Choose Inbound or Outbound transfers, the month being reported, and the year, then click "Next."
11. Click the "Browse" button and navigate to the saved file you created in Steps 1-3. Select the .csv file, and click "Open".
12. Choose file, and click "Open" to return to "Upload Inventory" pop-up window, then click "Next."
13. You can now select which columns have the information required.
14. Please note that if the drop-down menus on this screen do not show the name of columns in your file, end the process by clicking the "x" in the upper right-hand corner of the pop-up window, then open the CSV file, and make sure that the column headers/titles are in Row 1 – then save the file, and restart the upload process.
15. Upload Inventory pop-up – "Map Headers" tab:
    a. "Receiver Data Column" or "Sender Data Column" – select the column that has patient/caregiver/grower card numbers.
    b. "Product Type Data Column" – choose the column with the type of marijuana item (usable marijuana, edibles, topicals, concentrates, etc.) of the products transferred.

c. “Weight of usable marijuana Data Column” – this is where the upload utility will search for the weight of usable marijuana **in grams.**
d. “Quantity Data Column” – this is a count of the products sold, and is where the upload utility will search for the quantity of all products other than usable marijuana. (Sometimes this is the same column that has the weight of usable, but not always).
e. “Unit of Measure Data Column” – select the column that indicates the units of measure being reported (for example, g, grams, kg, units, each, etc.).

16. Notes about the “Map Headers” tab:
    a. “Header” just means the title or label of a column.
    b. You can select the same CSV-column for multiple Upload-column categories. For example, many POS systems report “amount” “quantity” and “units of measure” all in one column – that is okay. If a line item is an extract, that column could read “2.0 units” and if the next line is usable marijuana, the same column may read “7.0 grams.” Simply choose the same column (in the drop down menus) for all three options: “Amount Data Column,” “Quantity Data Column,” and “Unit of Measure Data Column.”
    c. Many POS systems do not report “Units of Measure.” If this is the case, simply choose the same column you chose for “Amount Data Column.” Usable marijuana entries will be assumed to be in grams by default.
17. After choosing your columns, click “Next.”
18. This next tab, “Confirm Upload,” tells you if any rows won’t successfully be uploaded. If no errors were found continue to step 25.
19. Clicking the “Show Invalid Row Line #s” button will list the Row number and error message of each problem line.
20. You may need to alter the data in your CSV file to address the error messages you see.
21. Once you’ve edited your file, be sure to save it, and then press “Choose File” at the top of the Upload Inventory pop-up.
22. Click “Browse” and return to Step 10 above.
23. Alternatively, you may need to click “Map Headers” at the top of the pop-up window, and make sure you have selected the correct columns, and proceed from Step 14 above.
24. Even with errors, you can press “Upload Transfers” button at the bottom, and the data in rows that do not have errors will be uploaded, **however, the rows with error messages will not be uploaded – if there are actual transfers that took place, but the data is not uploaded, your report will be incomplete.**
25. Once you have verified that all of your transfer data will successfully upload with no errors (and that any remaining rows with errors do not contain transfer data), click the green “Upload Transfers” button.
26. After the upload, press “Close” in the lower right hand corner of the upload pop-up window.

After Uploading:

1. Entries from the upload can be individually changed by clicking the “Actions” button, and choosing “Edit [month] [year] Transfers.” This brings you to a new tab/window, where you can edit or delete line-by-line. However, you won’t be able to save a change unless the patient/caregiver/etc. card number is valid and current.
2. You can remove an entire month’s worth of reporting by clicking “Actions” and choosing “Remove all Transfers for [month] [year].”
3. Editing or deleting either individual transfers or entire months may not be possible for data that is more than one month old.
4. You can generate a report of all reported monthly data, by pressing “Generate YTD Inventory Reports” button at the bottom of the Inventory page. This button leads to a pop-up window where you select beginning and ending dates. The actual days chosen do not matter, only the months you choose will determine which months of reporting will be included.

After Generating YTD Inventory Reports:

1. Note that if you choose to use the web-browser to view this report, sorting by “Month” will alphabetize the months, and will not put them in chronological order
2. A more useful way to use this report is to export it to a file:
    a. In the upper right, you can click “Copy” then open an excel file, and paste the data.
    b. You can also click CSV or Excel. A “Save as” window will auto-populate an empty filename, with just the .csv file-extension. Once you’ve named and saved the CSV, it can be opened in Excel, and saved as a normal .xlsx file in case you want to save formatting, formulas, or multiple sheets, none of which will work in a CSV.
    c. The “Print” button will not immediately start printing sheets and sheets of data. Instead it will bring up a print preview, with all the data on one page. To get out of print preview, press the “Escape” key.

What is a CSV?

CSV is an acronym for a “comma-separated values” file. It’s a file similar to a spreadsheet, but in simpler form. It cannot store multiple sheets, macros, formulas, or formatting. If you have a program that can open and save spreadsheets (such as Excel), then you can use that program to save your files as .csv files. Simply click “File” -> “Save As” -> [choose a location to save]. Then there will be a dropdown menu that says “Save as type:” Click that menu, and choose “CSV (Comma delimited) (*.csv)” from the menu, and proceed as normal, creating a name and location for your file. (Remember it’s helpful

to indicate in your file name whether it is inbound or outbound data, as well as the month being reported – for example “Inbound MMD00001 June 2016.csv”). Please note that **you cannot simply change the file-extension of an existing file without opening it and saving it as a different file-type**.